



Step	Action
1	To access the OU Marketplace as a Shopper, go to Compass.ou.edu , login with your credentials and select Financial System OUM PROD , the OU Marketplace .

The screenshot shows the University of Oklahoma homepage. At the top left is the university logo and name. To the right is a search bar. Below the logo is a 'Home' button. A breadcrumb trail reads 'HOME /'. A dropdown menu titled 'PeopleSoft Financials Environments' is expanded, listing several links: Pre-Prod (FSPRD), Demo Version (HURFS920), Financials Development (FSDEV), Financials Test (FSTST), Financials Conversion (FSCON), Financials System (FSSYS), Financials System (FSINT), Financials System (FSMOC), Financials System (FSTRN), Financials System OUM TEST, and Financials System OUM PROD. The last link is highlighted in yellow.

3	The first time you login to the Marketplace , you'll be prompted to update your Profile .
4	Click on Default User Settings > Default Addresses and click the Select Addresses for Profile button.

The screenshot shows the 'My Profile > Default Addresses' page in the Marketplace. On the left is a sidebar with icons for Home, Shop, Orders, and Reporting. The main content area has a header 'MARKETPLACE' and a breadcrumb 'My Profile > Default Addresses'. Below this is a 'Services Testing' section with 'User Name 105043'. A list of settings is shown, with 'Default Addresses' selected and highlighted in blue. To the right, the 'Default Addresses' section has 'Ship To' and 'Bill To' tabs. Below the tabs is a 'Select an address to edit' prompt and a 'Shipping Addresses' list. A yellow button labeled 'Select Addresses for Profile' is highlighted.

5	Type in any part of your shipping addresses and then select the radio button next to the correction location .
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Default Addresses

Ship To
Bill To
?

Select an address to edit Select Addresses for Profile

Shipping Addresses

Address Search

Nickname / Address Text

Results Per Page

Search

Addresses Found: 239 Page 1 of 24

Name	Address
<input type="radio"/> 865_0300	Attn: Services Testing Bldg: Floor: 0300 865 RESEARCH PARKWAY RESEARCH PARKWAY 0300 OKC, OK 73104 United States
<input type="radio"/> FH_0001	Attn: Services Testing Bldg: 0013 Floor: 0001 865 ASP AVENUE FELGAR HALL 0001 NORMAN, OK 73019 United States
<input type="radio"/> FH_0100	Attn: Services Testing Bldg: 0013

6 The **default button** will be checked so that this is your default address for all future orders. Click **Save**.



Default Addresses

Ship To Bill To

Select an address to edit Select Addresses for Profile Delete Address

Shipping Addresses **Edit Selected Address**

Nickname 865_0300

Default

Current Default Address 1100_0142

ADDRESS

Attn: * Services Testing

Contact Line 2 Bldg:

Contact Line 3 Floor: 0300

Address Line 1 865 RESEARCH PARKWAY

Address Line 2 RESEARCH PARKWAY 0300

City OKC

State OK

Zip Code 73104

Country United States

Save

7 Next, click on **Cart Assignees > Add Assignee**.

MARKETPLACE

My Profile > Cart Assignees

Services Testing

User Name 105043

- User Profile and Preferences >
- Default User Settings >
- Custom Field and Accounting Code Defaults
- Default Addresses
- Cart Assignees**
- Checkout Settings
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >

Cart Assignees

Add Assignee...

My Cart Assignees

Name	Action
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8 Search for your **Requester** by name. If you have several **Requesters**, click **Add Assignee** again to find another **Requester**.

User Search

Last Name 

First Name 

User Name 

Email 

Role 

Results Per Page

9 To set a particular **Requester** as the **Primary Requester**, click **Set as Preferred**.

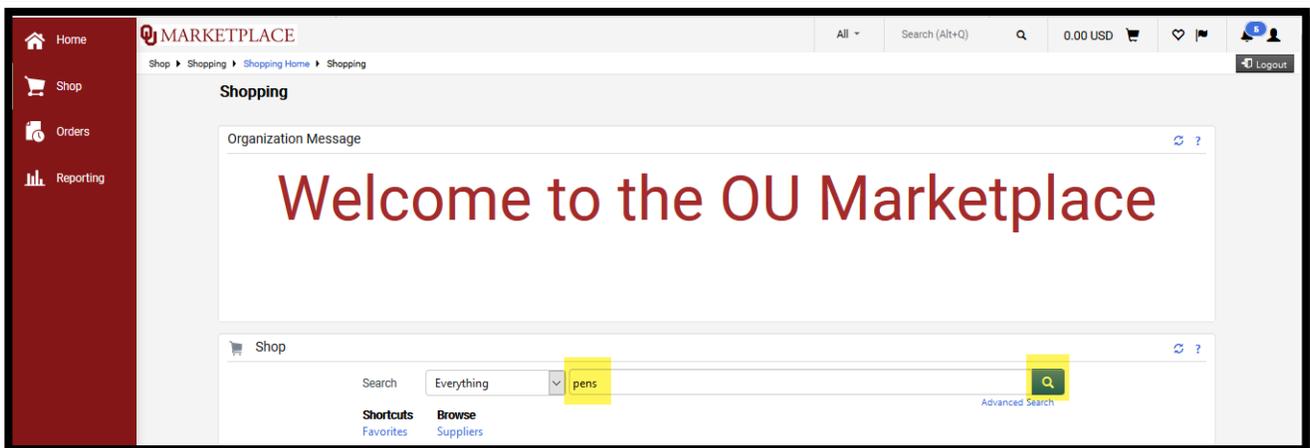
Cart Assignees

My Cart Assignees

Name	Action
Suzanne Cook	<input type="button" value="Set as Preferred"/> <input type="button" value="Remove"/>
Dianna Rustin	<input type="button" value="Set as Preferred"/> <input type="button" value="Remove"/>
Susan Evans	<input type="button" value="Set as Preferred"/> <input type="button" value="Remove"/>

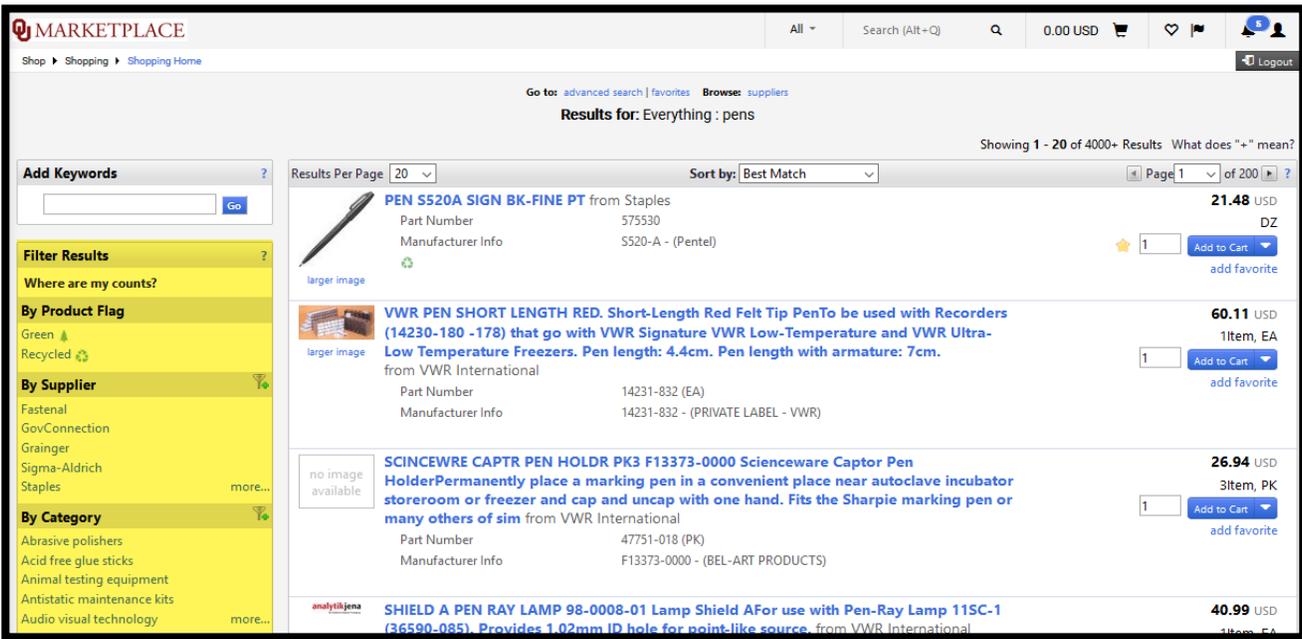
10 Once your Profile is established, click on the **Home icon**  **Home** to the far left to begin shopping.

11 To search for a particular item across all punch-out suppliers, type in the **name of the item** in the **search bar** and click on the search icon .



The screenshot shows the OU Marketplace Shopping interface. On the left is a navigation menu with icons for Home, Shop, Orders, and Reporting. The main content area features a large "Welcome to the OU Marketplace" message. Below this is a search bar with a dropdown menu set to "Everything" and the text "pens" entered. A search icon is highlighted in yellow. The top of the page includes the "MARKETPLACE" logo, a currency display of "0.00 USD", and a "Logout" button.

- 12 Results from all suppliers will be displayed and can be narrowed down by using the **Filter Results** options to the left.



The screenshot shows the OU Marketplace search results for 'Everything : pens'. The page displays a list of products with their details, including part numbers, manufacturer information, and prices. A 'Filter Results' sidebar is visible on the left, and the search results are sorted by 'Best Match'. The products listed include:

- PEN S520A SIGN BK-FINE PT** from Staples, Part Number 575530, Manufacturer Info S520-A - (Pentel), Price 21.48 USD.
- VWR PEN SHORT LENGTH RED. Short-Length Red Felt Tip Pen** (14230-180 -178) that go with VWR Signature VWR Low-Temperature and VWR Ultra-Low Temperature Freezers. Pen length: 4.4cm. Pen length with armature: 7cm. Price 60.11 USD.
- SCINCEWRE CAPTR PEN HOLDER PK3 F13373-0000 Scienceware Captor Pen Holder** Permanently place a marking pen in a convenient place near autoclave incubator storeroom or freezer and cap and uncap with one hand. Fits the Sharpie marking pen or many others of sim from VWR International. Price 26.94 USD.
- SHIELD A PEN RAY LAMP 98-0008-01 Lamp Shield A** For use with Pen-Ray Lamp 11SC-1 (36590-085). Provides 1.02mm ID hole for point-like source. Price 40.99 USD.

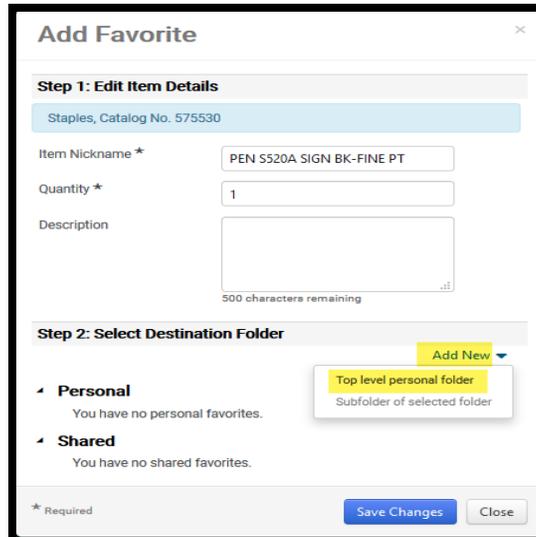
- 13 Locate the **item** needed, update the **Quantity** and click **Add to Cart**.



The screenshot shows the product detail page for 'PEN S520A SIGN BK-FINE PT' from Staples. The product information includes the part number 575530 and manufacturer info S520-A - (Pentel). The price is 21.48 USD. The quantity is currently set to 1, and the 'Add to Cart' button is highlighted in yellow.

- 14 To make the item a favorite, click **Add Favorite**.

- 15 In the pop-up window, click the **Add New** drop-down to create a **Top-level personal folder**.



The screenshot shows the 'Add Favorite' pop-up window. It is divided into two steps:

- Step 1: Edit Item Details**
 - Item: Staples, Catalog No. 575530
 - Item Nickname: PEN S520A SIGN BK-FINE PT
 - Quantity: 1
 - Description: (Empty text area with 500 characters remaining)
- Step 2: Select Destination Folder**
 - Buttons: Add New (dropdown), Save Changes, Close
 - Personal: You have no personal favorites. (Top level personal folder, Subfolder of selected folder)
 - Shared: You have no shared favorites.

- 16 Enter a **name** for the folder and click **Save Changes**.

Create Personal Folder ✕

Name *

Description

254 characters remaining

* Required

- 17 The item will now be assigned to your personal folder. Click **Save Changes** to add the item to the folder.

Add Favorite ✕

Step 1: Edit Item Details

Staples, Catalog No. 575530

Item Nickname *

Quantity *

Description

500 characters remaining

Step 2: Select Destination Folder Add New ▲

- Personal**
 - My Supplies
- Shared**

You have no shared favorites.

* Required

- 18 Return to the home screen of the Marketplace by clicking on the **Home icon** and your favorites can now be accessed under the **Favorites** hyperlink under the main search bar.

MARKETPLACE
All ▾
Search (Alt+Q) 🔍
0.00 USD 🛒
♥️

Shop ▸ Shopping ▸ Shopping Home ▸ Shopping

Shopping

Organization Message 🔄 ?

Welcome to the OU Marketplace

Shop 🔄 ?

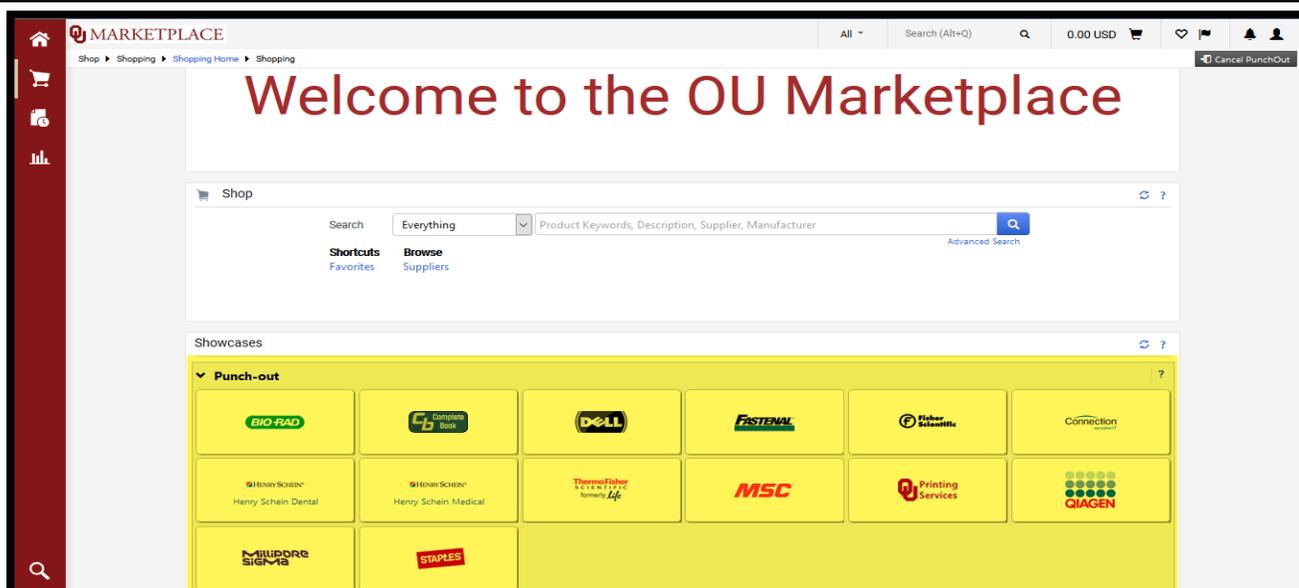
Search Product Keywords, Description, Supplier, Manufacturer

Shortcuts
Browse
Advanced Search

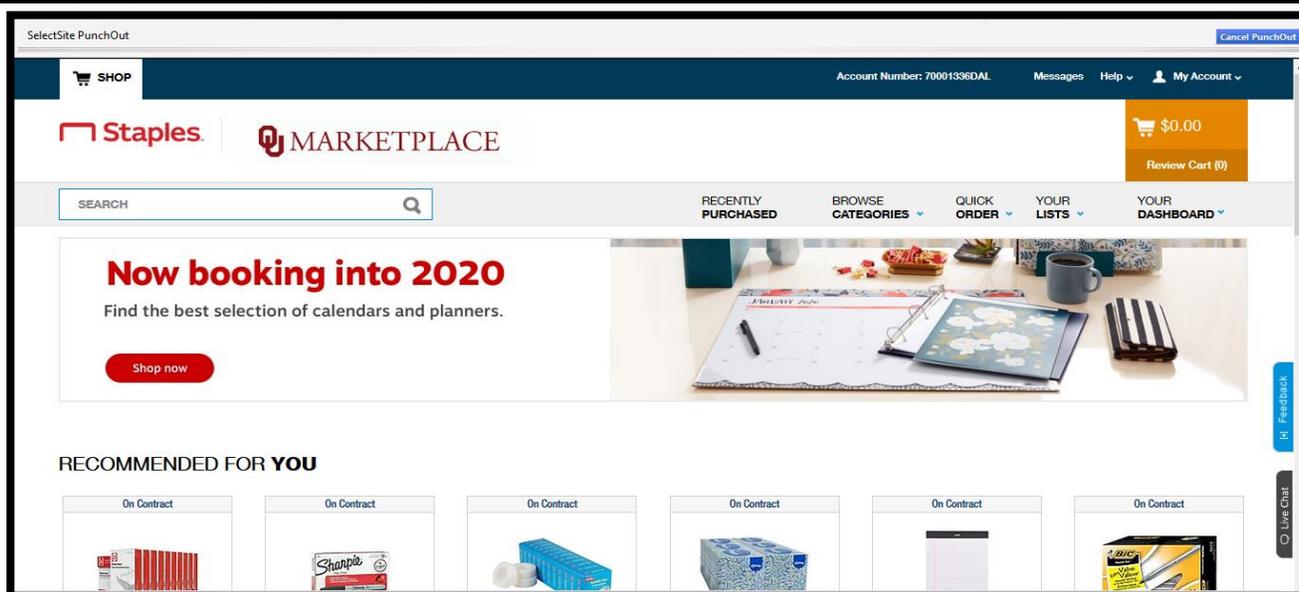
Favorites
Suppliers



- 19 To search for an item from a particular supplier, click on the **supplier's logo** under the Punch-out menu on the home screen.



- 20 The Marketplace will connect to the supplier's punch-out page and you can search for the needed item as you normally would through the supplier's website.



- 21 Once the item has been located, update the **quantity** and **add** the items to your cart.

- 22 Each supplier's site will be different but use the option to **checkout** or **return to your cart**.



SelectSite PunchOut Cancel PunchOut

SHOP Account Number: 70001336DAL Messages Help My Account

Staples MARKETPLACE \$7.50
Review Cart (1)

SEARCH RECENTLY PURCHASED BROWSE CATEGORIES QUICK ORDER YOUR LISTS YOUR DASHBOARD

23 Once returned to your shopping cart, click on the **Review Shipping** button.

MARKETPLACE 20.28 USD

Shop My Carts and Orders Open My Active Shopping Cart Cart - Draft Cart Logout

Shopping Cart for Services Testing Continue Shopping

Name this cart: 2020-07-17 105043 01 1 Item(s) for a total of 20.28 USD
subtotal: 20.28 USD
estimated tax, shipping & handling: 0.00 USD

Review Shipping or Assign Cart

Have you made changes? Update Help Empty Cart Create New Cart Perform an action on (0 items selected)... Select All

Staples more info...

The item(s) in this group was retrieved from the supplier's website. [What does this mean?](#)

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 5/17/2020 1:44:20 PM
Line(s): 1

Product Description	Unit Price	Quantity	Total
Staples Jumbo Paper Clips, Nonskid, 10/Pack with 100/box (A7026606/72577)	6.76	3	20.28
Part Number: 472514	PK		
Manufacturer Info: A7026606/72577 - (GENERAL BINDING)			
Commodity Code: 602700 SUPP-OFFICE			

Supplier subtotal **20.28 USD**

24 Ensure that the shipping location selected is correct, being especially cautious to ensure that large items can be delivered to the location. Click the **Edit** button if the shipping location needs to be changed.

MARKETPLACE 20.28 USD

Orders Search Carts Summary - Draft Cart Logout

General Shipping Final Review Assign Cart

All done! The required information has been completed and this request is ready to be submitted.
 Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Return to shopping cart Continue Shopping

Cart Comments Attachments History

Summary Shipping Supplier Info Taxes/S&H Hide value descriptions

General	Shipping
Cart Name: 2020-07-17 105043 01 edit Prepared by: Services Testing Prepared for: Services Testing Ship Via: Best Carrier-Best Way	Attn: Services Testing edit Bldg: 3045 Floor: ANDREWS ACADEMIC TOWER - MED CARDIOLOGY MEDICINE - CARDIOLOGY OKLAHOMA CITY, OK 73104 United States View/edit by line item...

Supplier / Line Item Details ?

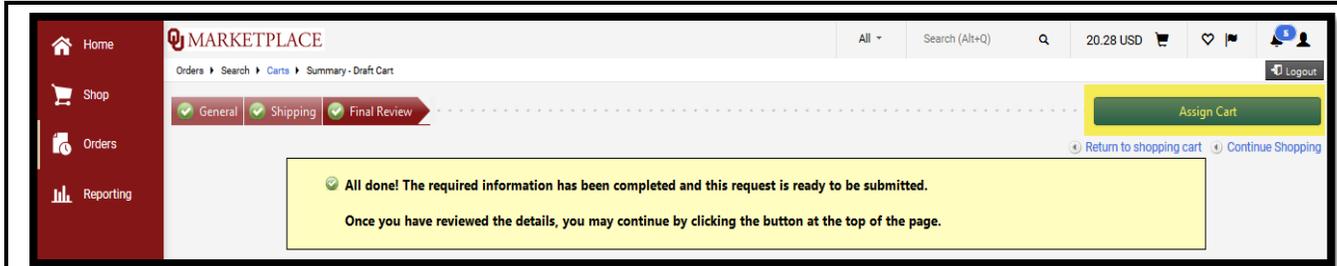
Hide line details For selected line items Add to Favorites Go

Staples more info... View/edit by line item...

PO Number To Be Assigned

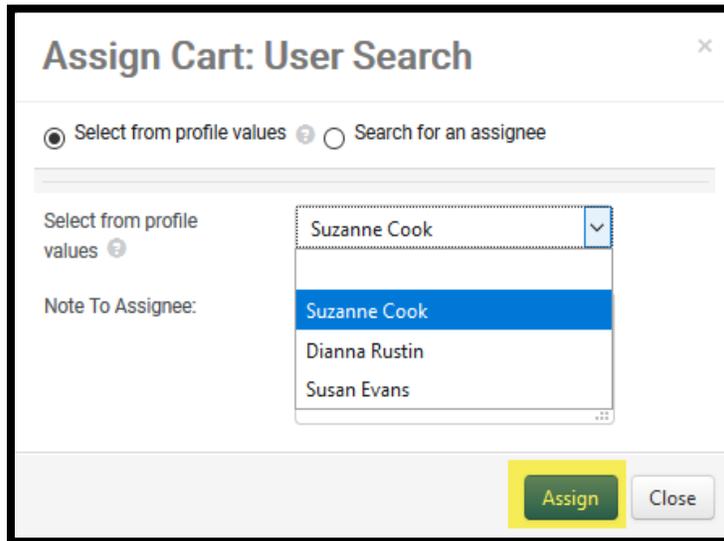
Powered by JARGAER | Privacy Policy

25 Once the shipping location has been verified, click **Assign Cart**.

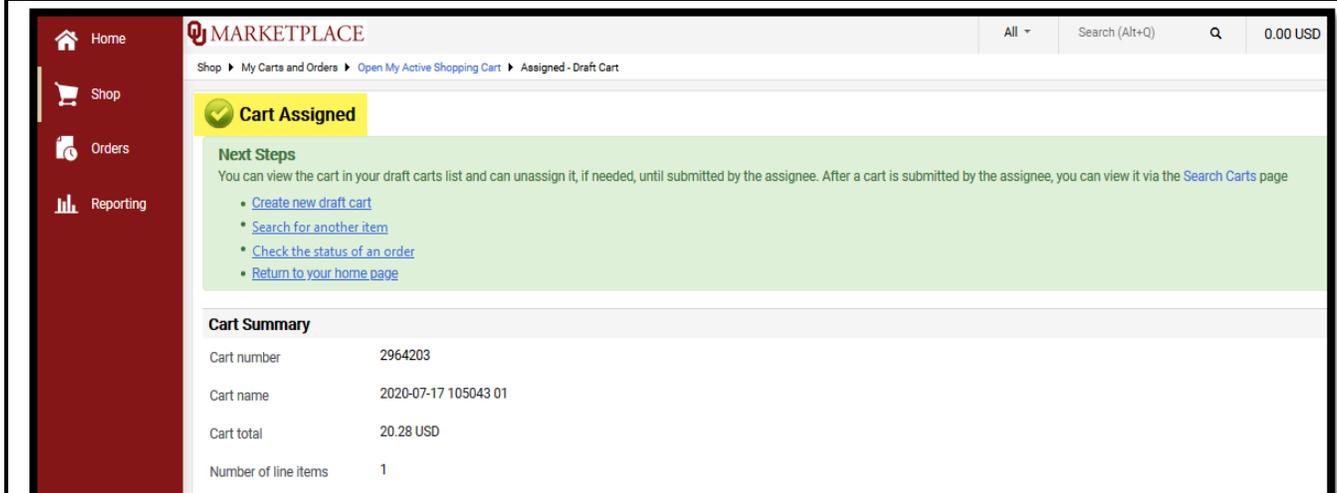


26 If you have a **Primary Requester** loaded in your profile, their name will automatically appear.

27 To choose another **Requester**, select the drop-down arrow and choose the appropriate **Requester** for this order. Click **Assign**.



28 A **confirmation** screen noting that your cart has been assigned will appear. Your Requester will automatically receive an email notifying them that your cart is pending.



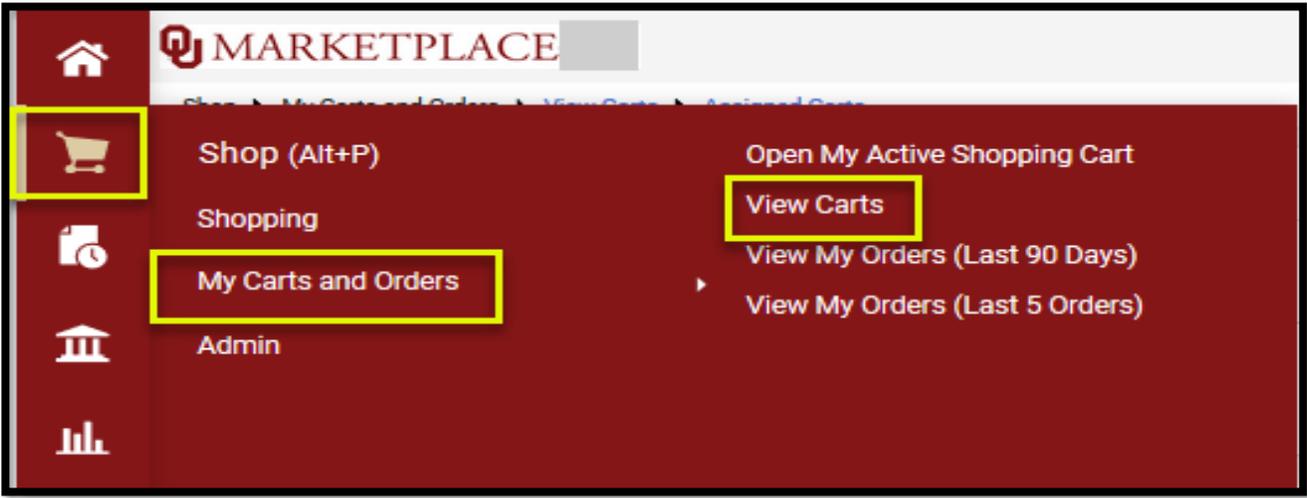
Cart Summary	
Cart number	2964203
Cart name	2020-07-17 105043 01
Cart total	20.28 USD
Number of line items	1

29 Note that orders to a supplier that does not have a punch-out catalog in the OU Marketplace should be coordinated offline with the Requester as those orders will need to be submitted via PeopleSoft and Shoppers do not have access to PeopleSoft.

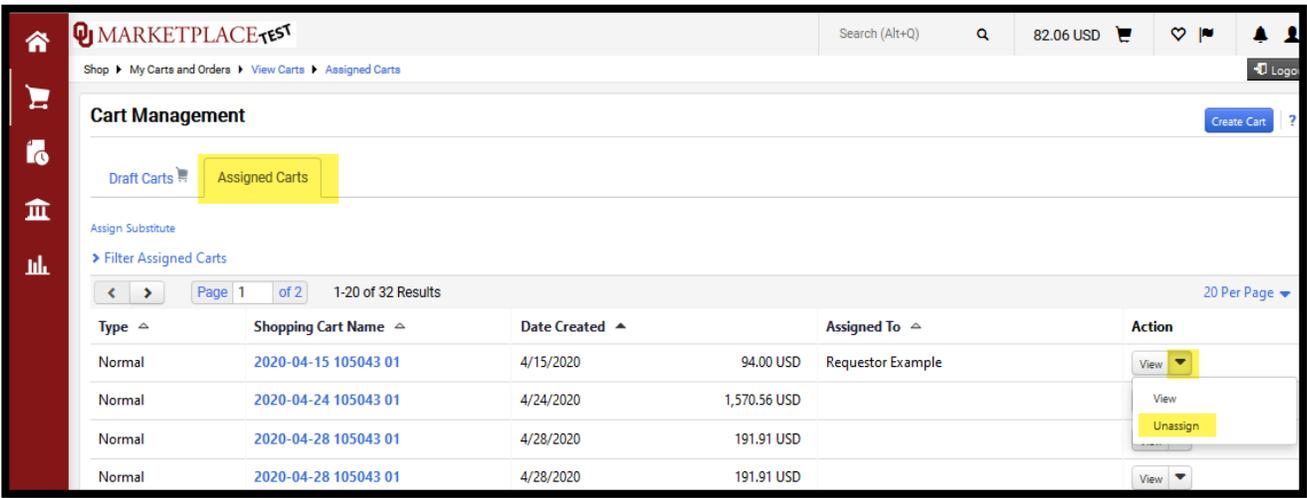
30 If your Requester becomes unavailable after you have assigned a shopping cart to them, you can choose to reassign the cart to another Requester.



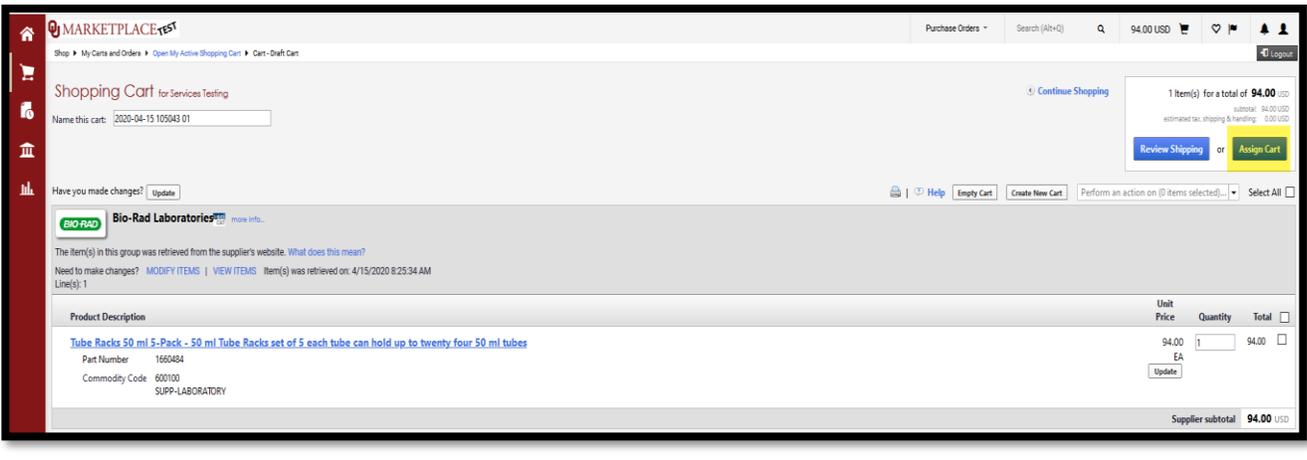
31 From the Marketplace homepage, click on the **Shopping cart icon**, **My Carts and Orders** and then **View Carts**.



32 Your assigned carts will be displayed. Locate the cart that needs to be reassigned and click the drop-down option next to **View** and select **Unassign**.



33 Your cart will be unassigned from the original Requester and you will be returned to your shopping cart. Click **Assign Cart**.





34 Select the **Search for an assignee** option and through the **User Search** pop-up window, select a new Requester and click **Assign** to reassign the cart to them.

